Navigate Between Sites & Add a New Site

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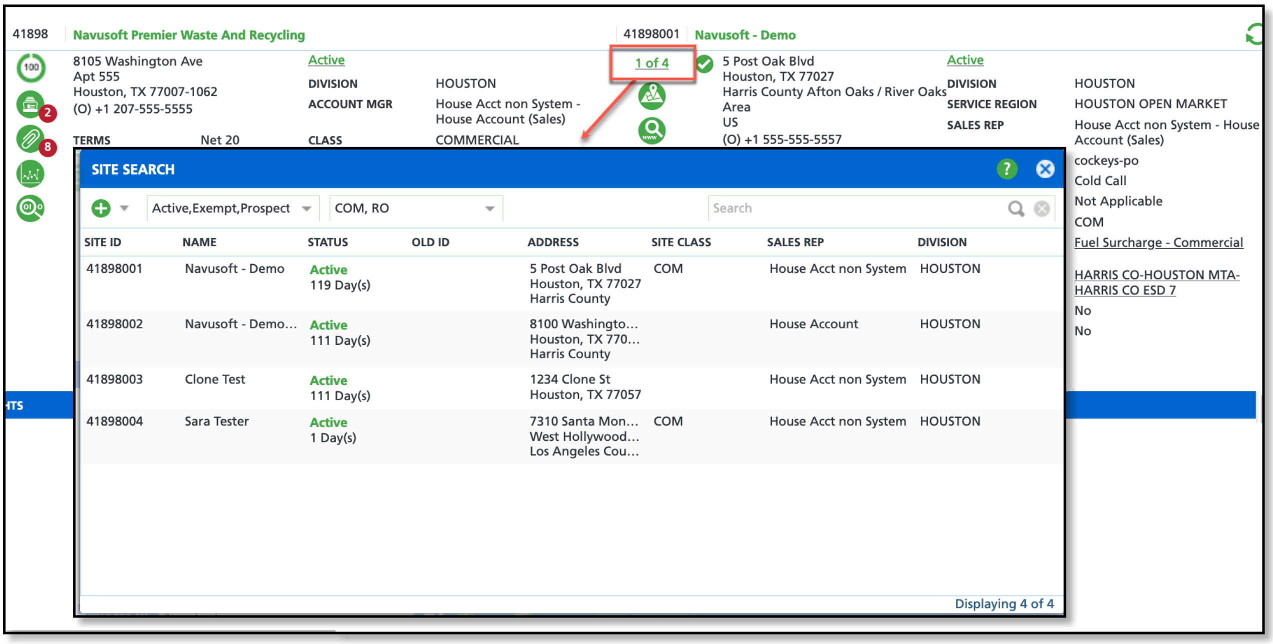
Pathway: *Accounts > Search > Account Details Screen*

From the Customer screen, users can navigate between various site locations under the parent account, add new sites, and edit existing ones.



Permissions

The following permissions determine what a user can do beyond viewing a site when editing it:

Permission ID	Permission Name
5	View Account
6	View Site
8	Edit Site Status
32	Add Photo to Site Detail
33	Delete Photo from Site Detail
67	Add Active Site
282	Edit Site Billing Settings
337	Edit Site Service Address
338	Edit Site Division and Service Region
339	Edit Site Source
340	Edit Site Sales Rep
451	Add or Edit - Override Account or Site Surcharge Rates

Field Descriptions - Add Site

Basic Settings

The Basic Settings tab includes vital site details like address, site name, notes, and other essential information for accounting and operational purposes.

Field	Description

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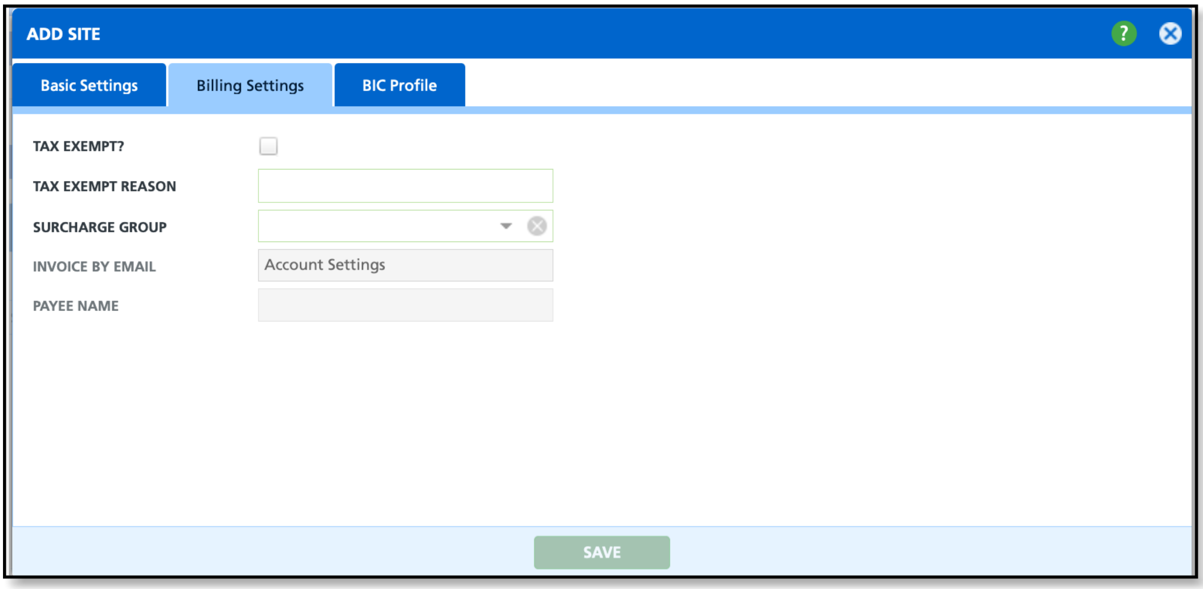
Contact/Location Information (Name, Address, Phone)	Enter the contact and location information for the site.
Signature Required	If selected, the driver will be required to collect a signature each time they service the location.
LEED Reportable	If selected, data will be collected for environmental reporting.
Division	The division to which the site belongs. The division assigned to a site determines who manages the site in areas such as dispatch and operations and facilitates billing processes.
Service Region	Identifies the region the site belongs to.
Tax Region	Identifies the tax region the site belongs to.
Source	Indicates how the site originated and helps with future sales and marketing campaigns.
Sales Rep	The sales representative that manages the site.
Status	Indicates the current status of the site.
Site Class	The Site Class the site is included in.
Generator	The amount of waste expected to be generated by this site.
EPA	The EPA ID for the site.
State ID	The State ID for the site.
Additional Service Minutes	Expected additional service minutes needed to complete services for this site. This helps with route optimization, if being used.
Note	Displays in the site details section when viewing the Customer screen.
Warning on Open	Displays as a site-specific pop-up warning anytime the site is accessed.
Access Information	Used for conveying information the driver will need to access a location. Displays every time the location is serviced.
Business Hours / Service Window	Used to identify a site's hours of operation. Select the calendar icon to add a schedule.

Billing Settings

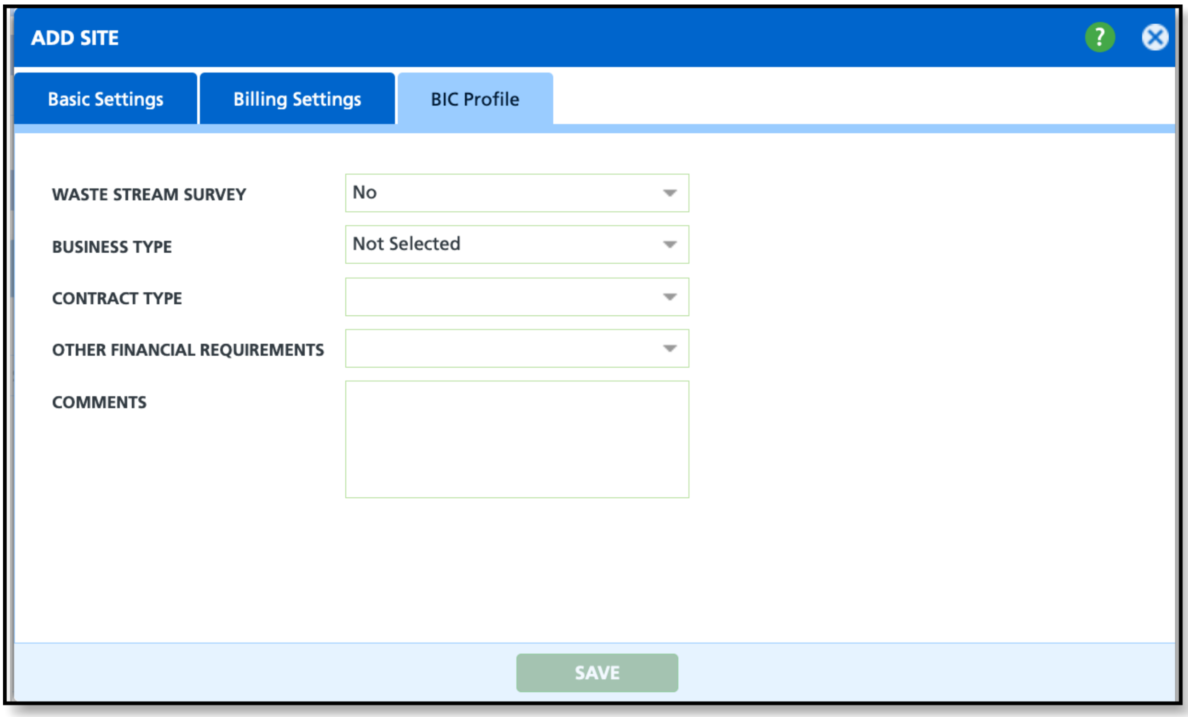
The Billing Settings tab establishes the billing requirements for the site, including the receipt method for invoices and the designated billing contact.



Field	Description
Tax Exempt	If the site **is** tax exempt and no tax region was selected when the site was created, select the **Tax Exempt** check box.
Tax Exempt Reason	If the Tax Exempt box is checked, enter supporting information for the reason why the site is exempt.
Surcharge Group	Select a Surcharge Group if the site is subject to a surcharge.
Invoice By Email	If the site is receiving invoices by email, select: • **Account Settings** and the site will follow the parent account's settings. • **Email With Link** and the site will receive a URL link to open the invoice. • **Email With PDF Attachment** and the invoice will be attached to the email as a PDF.
Payee Name	Select the name of the site's billing contact if the contact is different than the account contact. Contacts are only assigned here. To create a contact, the Contacts tool must be used.
Bill Group	Only displays if the 'Bill By Site' check box **for the account** is selected.

BIC Profile

The BIC Profile tab pertains to commercial establishments in New York mandated by law to arrange for the collection of their putrescible waste and recyclables through a hauler licensed by the Business Integrity Commission (BIC).



Field	Description
Waste Stream Survey	Indicates if a waste stream survey was completed for the site.
Business Type	Specifies the business categorization used to identify the type of waste generated by the site.
Contract Type	Indicates if the contract between the customer and hauler was written or oral.
Other Financial Requirements	Indicates if the site has other financial requirements.
Comments	Option to provide addition comments regarding the site's BIC profile.

View All Sites

1. Select **# of #** (example: 1 of 2) to display the Site Search popup window.
    - TIP: Use the filtering options at the top of the Site Search screen to narrow down the types of sites displayed. For example, if an account has many sites, you can filter to show only those with an "Active" status.
2. Double-click within the row of the desired site. The site will open in current window's tab.

Add a New Site

1. Select **# of #** (example: 1 of 2) from the Customer's screen to display the Site Search popup window.
2. Select the green **'+' icon** from the upper right corner in Site Search and select *Sit*. A new 'Add Site' popup window will display.
3. Complete all required fields highlighted red in the *Basic Settings* tab and click **Save.** Additional fields should be completed based on your company's data entry procedures.
4. Select the *Billing Settings* tab and minimally complete all fields highlighted red and click **Save.** Additional fields should be completed based on your company's data entry procedures.